

**Demand assessment report
for the incremental capacity process
starting 2025
between Vorarlberg (Austria) and the
German market area Trading Hub Europe
where no non-binding demand indications
were received**

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This report is a joint assessment of the potential for incremental capacity projects conducted by

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A. Non-binding Demand indications

In line with Art. 26 of Regulation (EU) 2017/459, the transmission systems operators conducting this market demand assessment report gave network users the opportunity to submit non-binding demand indications to quantify potential demand for incremental capacity. The period for submission on both sides of the border between Vorarlberg (Austria) and the German market area Trading Hub Europe (THE) was from 07 July 2025 to 01 September 2025 (COB).

Within this period no non-binding demand indications regarding the respective border were received by the TSOs. If non-binding requests for new capacity are received after the deadline, they will be taken into account in the next Market Demand Assessment report (2027-2029 cycle), according to the current legal situation, provided they are still valid.

B. Demand assessment

i. Historical usage pattern

As stated above, for the incremental capacity cycle addressed by this report no non-binding market demand indications were received. Therefore, an analysis of the historical capacity utilization between the respective entry-exit systems to support the assessment of the demand for incremental capacity is not necessary.

ii. Relations to GRIPs, TYNDP, NDPs

As there is no non-binding market demand, any physical supply gaps from the GRIP, TYNDP or the national network development plan cannot be closed via the process according to chapter 5 NC CAM, but must be taken into account in the respective processes.

iii. Expected amount, direction and duration of demand for incremental capacity

Bearing in mind the elements mentioned above, there is no demand for incremental capacity identified stemming either out of market indications or other sources.

C. Conclusion for the (non)-initiation of an incremental capacity project

Considering the elements mentioned in section A and B of this report, at this stage no ground is identified to consider starting an incremental capacity project. This doesn't preclude the conclusions of a following demand assessment exercise. Hence, for the entry-exit-systems addressed by this report no incremental capacity project nor technical studies will be initiated based on this market demand assessment report.

D. Provisional timeline

For the time being, no incremental project will be initiated. According to the current legal situation, the next market demand analysis will start in 2027 after the auction of the annual capacities.

E. Interim arrangements for the auction of existing capacity on the concerned IP(s)

Due to the fact that no incremental project will be initiated based on this market demand assessment, interim arrangements are not required for the time being.

F. Fees

Within the framework of the procedure on which this report is based, no fees were charged by any of the TSOs involved for the submission of non-binding demands, as there are no non-binding market demands.

G. Contact information

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